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ABSTRACT

This document examines some of the key issues raised during the second Washington Roundtable on Social Marketing, convened by the Academy for Educational Development (AED) in 1998. AED invited participants to examine whether the interactive technologies that are revolutionizing commercial marketing--personal computers, the Internet (especially the World Wide Web), and e-mail-based activity--can and should be applied to solve social problems. Presenters and participants were asked to assess the promise of various interactive technologies or applications that the private sector is using to make money that would help social marketers achieve their goals of social change. Participants were asked to use three basic criteria to gauge the promise of various technologies for social marketing: How can social marketers use these tools? What social problem could they help solve? and Do these represent a better or more efficient way to focus on audiences? Unless otherwise indicated, quotes or statistics referred to in this document were taken from the presentations. This report does not represent a consensus among the participants; it is by exposing the complexity of the issues raised at the Roundtable that this document seeks to serve the field of social marketing. Chapters include: (1) Introduction: The Promise of Interactive Technologies; (2) Strategies for Online Marketing; (3)Interactivity and Social Marketing; (4) New Tools for Social Marketers; (5) Issues and Challenges for the Future. Included in five annexes, are: Agenda and Participants; glossary; Internet resources for social marketers; references; and excerpt from the Coalition for Advertising Supported Information and Entertainment (CASIE) Principles of Interactive Media Audience Measurement. (Contains 10 references.) (AEF)

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Social marketing and the New technology

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Social marketing and the *New* technology

Proceedings of a Washington Roundtable

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2. Strategies for Online Marketing
3. Interactivity and Social Marketing
4. New Tools for Social Marketers
5. Issues and Challenges for the Future

AED

Academy for Educational Development

Foreword

In the spring of 1998, several dozen practitioners, students, and theorists of social marketing gathered in Washington, D.C., to discuss the implications of the information revolution for their profession. This Washington Roundtable on Social Marketing was convened by the Academy for Educational Development (www.aed.org) as a follow-on to the first Washington Roundtable held in 1996.

AED invited participants to examine whether the interactive technologies that are revolutionizing commercial marketing — personal computers, the Internet (especially the World Wide Web), and e-mail-based activity — can and should be applied to solve social problems. Presenters and participants were asked to assess the promise of various interactive technologies or applications that the private sector is using to make money that would help social marketers achieve their goals of social change. AED asked participants to use three basic criteria to gauge the promise of various technologies for social marketing:

- How can social marketers use these tools?
- What social problem could they help solve?
- Do these represent a better or more efficient way to focus on our audiences?

Through formal presentations, panel discussions, and question-and-answer sessions, participants brought diverse experiences in the field of social marketing. They represented public and private health organizations, government agencies, nonprofit research and educational organizations, colleges and universities, media firms, advertising, marketing, and public relations firms. (Annex 3 includes the meeting's agenda and a list of participants.)

This document examines some of the key issues raised during the Roundtable, and, unless otherwise indicated, quotes or statistics referred to here were taken from the presentations. This report does not represent any consensus among the participants. In fact, for many of the participants, the day's discussion raised more questions than it answered and represented the beginning of a longer process of

inquiry and reflection. It is by exposing the complexity of the issues raised at the Roundtable that this documents seeks to serve the field of social marketing.

This was the second Washington Roundtable on Social Marketing; the first was convened by Porter Novelli (www.porternovelli.com) in October 1996, to mark the 25th anniversary of the field of social marketing. At that first meeting, participants addressed a single, overarching question: Should the social marketing model be ratified, refined, or replaced?[1]

This document is meant to continue the critical dialogue about the future practice of social marketing that began at these two Washington Roundtables.

—Bill Smith, Executive Vice President and
Director of the Division of Social Development, AED

—Beverly Schwartz, Director of Social Marketing, AED

[1] *The full consensus report was published in 1996 by Porter Novelli (Washington, D.C.) as Consensus Conference on the Future of Social Marketing: Summary Report, by Edward Maibach, Amy Shenker, Stephanie Singer, Suzanne Meadows, and Dana Faulkner.*

1. Introduction

> Technology is transforming our existence in profound ways, and the pace of change is speeding up, not slowing down. Almost all technology today is focused on compressing to zero the amount of time it takes to acquire and use information, to learn, to make decisions, to initiate action, to deploy resources, to innovate. When action and response are simultaneous, we are in *real time.*
>
> —Regis McKenna[1]

There has been a revolution in mass communications since the telegraph ushered in the age of electronic communication in the mid–1800s. Each subsequent innovation — telephone, radio, motion pictures, television, computers, and, most recently, the Internet — has brought us progressively closer to overcoming the two fundamental limitations on communication: time and

[1] *Regis McKenna, Real Time: Preparing for the Age of the Satisfied Customer. (Boston: Harvard Business School Press, 1997), p. 4. See also www.mckenna-group.com.*

space. In the process, these technologies have changed the way we live, work, and do business.

The most recent of these—the interactive technologies embodied in and enabled by the Internet—are also forcing a reevaluation of how mass communication can be used to address social problems. Like other mass media, the Internet can reach large audiences and provide access to large amounts of data and information. According to behaviorist Michael Chamberlain, "For the first time in human history we have available to us the ability to communication simultaneously with millions of our fellow man, to furnish entertainment, instruction, [and a] widening vision of national problems and national events."[2]

As Bill Smith of the Academy for Educational Development (AED, www.aed.org) points out, this new interactive media is different from other mass media in its impact on the way people can receive information (24 hours a day), on the way information can affect people's behavior (it can cue and model behavior), and on the way information can affect people's judgments (gaming models can be used for decision-making). If the challenge of other mass media was to deliver more information, then the challenge of Internet-based mass media is to deliver more appropriate, accurate, and socially valuable information. As Smith puts it, "It's not that we don't know enough. The real problem is that we know too much that's all wrong." He echoes Michael Chamberlain in describing four ways in which the Internet is fundamentally different from other mass media:

- Demassification: The Internet lets us speak to everyone.
- Interactivity: The Internet allows others to talk back or respond to us, individually or as members of a group — that is, it allows interpersonal communication.
- Asynchronicity: Using the Internet, we can communicate (speak and/or respond) at anytime, including in "real time."
- Mechanomorphism: The Internet allows us to communicate in our own terms but, at the same time, changes the nature of our communication — in short, it makes us more like it.

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[2] *Adapted from Michael Chamberlain's "New Technologies in Health Communication," American Behavioral Scientist, November 1994, pp 271-284.*

This fourth characteristic, mechanomorphism, is what Marshall McLuhan described when he said, "the medium is the message": all technology gradually creates a totally new environment for human behavior.[3]

THE DAWN OF REAL TIME

Interactive technologies are changing our behavior by changing our terms of reference about time and space. The Internet collapses both and thereby allows us to function increasingly in real or "virtual" time, where action and response are simultaneous. One clear example is the advent of interactive marketing and real-time commerce, or e-commerce. The Internet creates a virtual marketplace, eliminating the lag between message and response, demand and purchase.

In real time, mass marketing gives way to interpersonal marketing. Indeed, online businesses may succeed or fail according to how well they enable individual customers to make informed purchases quickly. They must provide individual customers near-instant access to both the individualized information they need to make decisions and the means to complete the transaction.

Online commerce also supports McLuhan's theory that it is not the technology itself that changes people, but the "hidden environment of services created by an innovation."[4] E-commerce allows customers to fulfill their own expectations about service and satisfaction,[5] but, in so doing, it raises their expectations for future transactions. By simultaneously raising people's standards and empowering them to meet those higher standards, interactivity quickens the pace of creativity and creates a bias toward action and change: Individuals are motivated both to seek information and to act quickly on that information.[6]

These essential characteristics of interactivity — the creative tension between self-service and self-satisfaction and the bias toward action and change — are at the

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[3]*Marshall McLuhan, The Medium Is the Massage. New York: Bantam, 1967.*

[4]*Marshall McLuhan, lecture at Florida State University, 1970.*

[5]*Regis McKenna, Real Time, p. 6.*

[6]*NOTE: Throughout this draft, the redline is used to indicate passages that may be appropriate for call-outs or side-bars.*

root of interactivity's revolutionary effects on the commercial marketplace. They are also the reason why interactive technology, primarily the Internet, holds such promise for social marketers and others who seek to address social problems through communication and behavior change.

Interactive Applications for Social Marketing

Bill Smith outlines how some of the early applications of interactive, Web-enabled technologies for social marketing illustrate the potential power of the Net to promote social change:

- Camp Fire Boys and Girls allows visitors to its Web site (www.campfire.org) write a letter to a child to help his or her self-esteem.
- The first online press conference, held in February 1998, was enabled by desktop imaging software that brought real-time video to participants' desktops.
- Record company BMG Entertainment/RCA sponsors the online "Ultimate Elvis [Presley] Contest" (www.bmg.com/elvis/) as a means of gathering market intelligence on current and potential customers.
- Levis Strauss & Co. allows visitors to its Dockers™ site to receive an online fashion consultation and then to print out a "shopping list" to take to their local Dockers™ retailer.
- A growing number of tools are available for conducting online market research, including among others, Matchlogic, Focalink, and Truecount. Kodak and other companies are using the Internet for market research and product testing, including through online focus groups.

Some groups are already harnessing the power of the new technologies to promote social change, according to Smith. He points to India's Grameen Bank — an early pioneer of microenterprise — which has brought cellular phone service to 68,000 villages through the Grameen CyberNet. Another organization, WorldSpace, is using the Internet to deliver digital radio signals to areas of Africa, Asia, and Latin America. And a wind-up computer, currently under development, promises to bring the Net to areas that do not even have electricity.

The power of Internet-delivered information to change human behavior may be most evident in the field of health. Smith offers the example of the University of Pittsburgh's Global Health Network (http://www.pitt.edu/HOME/ GHNet/ GHNet.html). Originally with no formal budget, the mission of the Global Health Network is to develop the architecture for a health information structure to prevent disease. The site includes global directories of health professionals and medical information, which are closely monitored and frequently updated. The Global Health Network also runs an online distance education course for public health professionals from five countries, primarily in Africa.

Social marketers are not the first to realize the power of the Internet to bring change. Many Internet-related businesses and entrepreneurs have long recognized — and actively tried to exploit — the revolutionary nature of interactivity. For example, in the fall of 1994, Steve Case, CEO of AmericaOnline, described how the Internet would transform the practice of marketing by shifting the focus away from delivering a message and toward establishing a dialogue. In short, he said, marketing would be forced to be less intrusive, more informative, and less focused on the event (the transaction) than on the process of building relationships with customers.[7] When Case made these remarks, only about 1 million people used the World Wide Web, and neither his company (AOL) nor the other major online networks (Compuserve and Prodigy) provided direct access to the Internet. He also spoke just before a Connecticut company (Mecklermedia) launched the first Web-based electronic yellow pages and corporate advertising service.[8]

The Growing Online Market

Of course, the number of Internet users has grown exponentially since the fall of 1994. According to David Wickenden, of Fleishman-Hillard International Communications (www.fleishman.com), the online market in the United States nearly doubled between 1996 and 1998 (from 15.2 million people to 28.7 million). The June 1998 CommerceNet/Nielsen Internet Demographic Survey put the

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[7] *Steve Case, "Plenary Keynote: The Future of Digital Media Publishing," Mecklermedia Electronic Books Conference, New York, September 1994.*

[8] *"Mecklermedia's Electronic Yellow Pages And Internet Brochures Are Unveiled," Wall Street Journal, October 5, 1994. Interestingly, in announcing the launch of this site, the Journal questioned the wisdom of companies willing to spend $25,000 on Web advertising given how few people used it.*

number of Internet users over the age of 16 in the United States and Canada at 79 million, up from 58 million just 9 months previously. According to Jim Healy of Porter Novelli/Interactive (www.porternovelli.com), U.S. Commerce Department statistics show that the growth in Internet access parallels the early growth of radio and TV, which may indicate that 80 percent of U.S. households will soon be online.

Despite its rapid growth, the demographics of the online market remained fairly constant until recently. Until 1998, the typical Internet user continued to be a college-educated, professional male, with a relatively high income (about $60,000), and the ratio of women increased very slowly. Now, however, Internet users are nearly as likely to be female as male. In fact, there has been a dramatic increase in online shopping by women. As recently as June 1998, about 70 percent of online shoppers were male, but by October 1998, women not only comprised half of all online shoppers but were typically spending two to four times as much per online purchase.[9]

The median age of Internet users has been at or around 38 years for the past several years, but this is now shifting. According to Healy, the fastest-growing segment of the online market is senior citizens (age 55 and older),who may represent over 45 percent of Internet users by the year 2000. Research by Charles Schwab & Co. (www.schwab.com) shows that 40 percent of people over age 50 now have a personal computer at home, compared to just 29 percent in 1995, and that 70 percent of the seniors that own PCs have Internet access.

Even as the demographics of the online market have remained fairly constant, the character of online activity has undergone a transformation. Before 1994, when the first Web site was launched, much of the data available on the Internet was either housed on proprietary online networks, including commercial providers such as AOL and Compuserve, and/or could only be accessed or downloaded using fairly complex interactions that were beyond the capability (or patience) of most PC users. For the most part, public use of the Internet outside such networks was limited to e-mail.

The introduction of Web browsers gave the average user access to the Internet — the first browser was Spry's Mosaic, which was promoted as the "Internet-in-

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[9] *June 1998 date from CommerceNet/Nielsen (http://www.commerce.net/research/); October 1998 data from a telephone survey by Bruskin & Goldring (http://www.WebPromote.com/wpweekly).*

a-Box." Since then, of course, the data available directly on the Web has grown exponentially, as has the number of Internet service providers (ISPs) offering access to the Web. There are now well over 50 million Web sites, with more being added each day. A leading European Internet developer, Nua, estimates that there were over 100 million documents online at the start of 1998, a figure that the U.S. firm Inktomi predicts will grow to 800 million by 2000 (http://cyberatlas.com/market).

The growth of the Web has not led to the disappearance of the proprietary online networks, but it has changed their role and caused a fairly rapid consolidation of the market (for example, AOL recently bought both Compuserve and Spry). Many of these services evolved into ISPs, offering their members full access to the Internet in addition to proprietary content and e-mail services. A primary role of these networks is to filter, sift, and organize for their members or subscribers the vast quantity of information now available through the Web. For example, AOL subscribers largely stay within the AOL network, spending only about 17 percent of their time on the Web, according to Jim Healy.

Many commercial Web sites also serve primarily as information filters, finding, sorting, and organizing data for people. The most obvious are the online search engines such as Yahoo!, Excite, Lycos, Infoseek, and AltaVista. Other commercial sites filter information for a particular demographic profile, which helps them sell advertising. For example, Netscape provides information for small business and entrepreneurs (http://www.Netscape.com); Harvard Business School Publishing offers tips for corporate managers (http://www.hbsp.com); and the Online Women's Resource & Business Directory offers information for working women (http://www.workingwomen.com). Many companies and other organizations find a need to provide this type of information-filtering for their employees and clients, and they have created password-protected Intranet and Extranet sites that point users to proprietary data housed on internal systems and to public data housed elsewhere on the Internet.

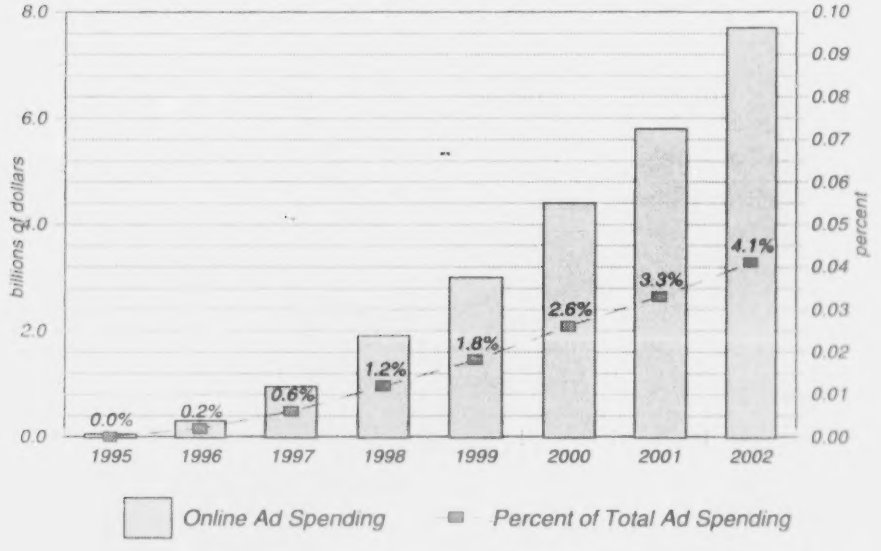
The New "Market of One"

Krystal Thomas of Magnet Interactive (www.magnet.com) described the Internet as having evolved through four generations of technology in four years. Initially, in 1994, Internet sites offered neither functionality nor interactivity, and most

content was text-based, largely in HTML. People's enthusiasm for the Internet was driven by the prospect of gaining access to large quantities of data.

The development of CGI scripting in 1995 allowed Internet sites to solicit information from individual users and ushered in the first stage of interactivity: people could establish an individual connection with a site, and site developers could track and analyze which information their users sought and saved. The third- and fourth-generation technologies, implemented during 1996 and 1997, enabled companies to develop partnerships with their clients online and, subsequently, to fully enable commercial transactions online. The number of people buying products and services via the Web doubled between September 1997 and June 1998, when it hit 20 million, according to CommerceNet/Nielsen (http://www.commerce.net/research).

Online Ad Spending, 1995-2002



Source: Jupiter 1998 Online Advertising Report

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Spending on online advertising has grown as the potential for full-scale Internet commerce has been fulfilled, according to David Wickenden (see figure), and online advertising represents a growing proportion of the total ad market. Wickenden sees no end in sight to the trend toward online commerce save for a lack of bandwidth (infrastructure) to deliver data and information online.

> Businesses are forced to move away from mass marketing and toward one-to-one marketing, or "solutions selling." Solutions selling requires businesses to develop methodologies for building marketing messages that use information *from* their customers rather than information *about* their customers.

The Internet shifts the emphasis of marketing from the supply chain (what products are available?) to the demand chain (what products do consumers want?), according to Krystal Thomas. Interestingly, many businesses are finding that taking even the most preliminary step in this direction can improve their marketing impact. Simply asking customers about their needs and preferences increases customer loyalty and improves the impact of their marketing efforts.

In many ways, one-to-one marketing fulfills Steve Case's vision of Internet marketing as a process for building dialogue rather than for delivering messages. At its core, then, the new technology is about more than sending messages in new ways, says Daniel Greenberg, columnist for the *Washington Post* and game developer; it's really about interacting in new ways.

A Dominant Medium

The broad appeal of interactivity is apparent in the continued growth in the number of Internet users, the explosion of information available on the Web, and the rapid growth of e-commerce. The appeal of interactivity is also leading the Internet to dominate other mass media, especially television.

> "If TV is *watching* something fun, interactivity is *doing* something fun."

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is how Daniel Greenberg puts it. He cites a recent survey that asked kids to choose between a computer and a TV; 71 percent chose the computer. In fact, as the computer has seized kids' attention in recent years, the TV has receded from their hearts and minds. Interactivity dominates TV in other ways too, says Greenberg, and not just for kids. In short, computers are taking over and redefining TV — Web TV, smart cable boxes, programmable satellite services, video on demand, and, eventually, interactive TV. The broadcast networks' audience share has dropped to levels inconceivable only a few years ago.[10]

Since the dawn of the age of mass communication, each innovation has changed the way we live, work, and do business by helping us overcome the limitations of time and space. The Internet is the culmination of this progress: it has collapsed time and distance and ushered in the era of real time. In the process, the Internet has done no less than change the ground rules for mass communication by replacing the old, top-down relationship between broadcasters and recipients with a complex web of relationships through which people can actively seek the information they need. As Daniel Greenberg says,

> "If the last century was the age of mass communication, then the next will be the age of 'mass interrelationships.'"

[10] *Dean Valentine of UPN has said, "When I started in this business, they said the networks' collective share could not go below 70 percent. Now it's in the 50's. The truth is, the actual floor is 0. It's a free country and you don't have to watch anything." New York Times Magazine, September 20,1998, p. 62.*

2. Strategies and Tools for Online Marketing

Interactive marketing requires a more subtle approach. Daniel Greenberg describes interactive marketing as a "laser" compared to the old mass media "sledgehammer" approach. He notes that people are becoming increasingly immune to the old pitches that "hit them over the head"with messages like, "Just do it!" or "Just Say No!" Online marketing is a process, he says, not an event: gathering information about targeted groups or individuals; reaching them with a pre-defined pitch; using their feedback to refine the target and the pitch; reaching them with the refined pitch; and so on.

In the past, businesses used salespeople to know and understand their customers. Through a dialogue that grew and evolved over time, salespeople could establish a relationship with their customers — sometimes close, sometimes more distant, depending on the customer. That relationships allowed them to give their customers what they really wanted and helped their companies grow. Of course, this kind of interpersonal communication is expensive, whether it is for selling or for behavior change.

The Internet allows a partial return to individual selling. Like these good salespeople, online strategies are most effective when they reflect and respond to

what the customer wants. Effective selling solutions reflect how people use the Internet in two ways:

- Effective marketing solutions are scalable, meaning they can grow as demand grows and build on the technology already in place. This makes them cost-effective by helping marketers avoid investing in new technology before they must.
- Effective solutions use technology to learn more about what customers want and to target the sales message to meet those demands.

As a start, online marketing strategies should reflect how people actually use the Internet now. According to Bill Smith of AED, most people are online for about an hour per day. They spend half this time sending and receiving e-mail, which means they have only a half-hour per day to access all the information available on the 50+ million Web sites. The bottom line, according to Jim Healy of Porter Novelli, is that most users visit only 18 sites per month. They use the Web primarily for news, information on hobbies or travel, government/community information, and entertainment. And they continue to go first to trusted sources for their information — America Online, Yahoo!, Netscape, Microsoft, Geocities, Weather Channel, CNN, New York Times, Washington, Post, MSNBC, etc.

The peak traffic on the Internet is from mid-morning through mid-afternoon, which means that most adults still use the Internet during the work day. Home Internet use is still primarily by children.

The challenge for marketers, then, is to attract traffic to their site during the few hours during the workday when the average Internet user is online. The crux of the strategy is to lead potential customers to a site through search engines, links to other Web sites (including advertising), and traditional mass media (TV, radio, newspapers, and magazines), where people still get most of their information. Strategic partnerships and alliances with other organizations, products, or institutions can also help attract traffic.

According to Jupiter Communications (http://www.jupiter.com), there are three basic ways to target advertising and other marketing messages to customers:

- Registration information: Sites that require or encourage registration can use the information supplied by users to target and personalize the marketing messages. Unfortunately, registration is not in widespread use and therefore

is less effective (when people are not required to register, they do not). Also, people are not necessarily truthful when they register.

- Psychographic assumptions: Psychographic targeting addresses the pitfalls of registration by using the little information that is readily available about users — for example, what browser they use, the time of day they visit, what platform they are on — to make some demographic assumptions. Of course, this may involve making some very broad generalizations (i.e., assuming that everyone who works for a particular company has the same demographic profile).
- Neural Net: Neural net software applications track the way people navigate through a site to "learn" more about them. Some applications will use that information to modify the site. For example, if a user "acts" like a teenager, the site may deliver a soft drink ad. These applications appear to work: Infoseek has reported a 50 percent increase in targeted ad click-throughs using a neural net software product called SelectCast.[11] The information tracked by such software is not stored in any database, but is recreated for each visit by each user.

Even if people visit a site, they will only use it if they can easily find what they want. At a minimum, the site must be easy to navigate and must not be too cumbersome. For example, the home page should download quickly, be visually appealing, and be easy to navigate. Also, because people visit only 2–3 pages of a site (remember, they are at work!), they should therefore be given a chance to take action in the first page or two. But easy navigation is meaningless if the information on the site does not meet visitors' needs — and their needs revolve around fairly quickly gaining the information they need to make well-informed, rational choices.

The goal, therefore, is to use the technology to establish an interactive connection with people, to start a conversation, and to build a relationship that centers around knowledge and trust:

> Consumers don't expect love or deep friendship from companies with whom they consider entering into a

[11] *WebPromote Weekly, May 1998, volume 1 (http://www.WebPromote.com/wpweekly).*

> commercial relationship. But neither should they have to tolerate a harsh, unremitting, one-way barrage of trivial messages demanding that they buy something to establish that relationship. They should expect to be treated with clarity, intelligence, and respect within the realistic confines of a frankly commercial — not personal — relationship.... Only by understanding the context of the customer at any given moment can the producer intelligently, and with clarity, help the customer achieve that sense of informed choice that is so necessary to the buying process.[12]

Like a good salesperson, the online marketer needs to listen to what the customer wants and respond appropriately, whether that customer is an individual or another business. Online tools provide marketers three means for two-way communication, according to David Wickenden of Fleishman Hillard:

- Targeting: Marketers can target their messages using contextual links with other sites, gathering registration information from users when they sign on to a site, or using cookies — files on a user's hard drive that are used to monitor which ad the user has just left — to track click-stream data.
- Direct response: Interactivity enables education and action through its search and database capabilities, its near-zero call-to-response cycle, and the fact that the success of messages can be tracked using click-throughs (i.e., hits and responses).
- Tracking: Marketers can get to a "market of one" by building detailed user profiles. For example, when users are allowed to personalize their access to a site, the way they use the site can provide information about their interests, demographic and psychographic profiles, and behavior or buying habits. Often, people volunteer this information in order to speed their access to the information they want.

Online marketers are developing computer-driven ways to understand the people who enter the system, including their interests and where they are in the buying

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[12] *Rich Melmon, "Real Time Marketing Versus One-to-One Marketing" (http://www.mckenna-group.com /realtime/r/rt/rt_mkg/melmon02a.html).*

process, and to send them a series of messages that are appropriate at any given time. For example, a first-time visitor to a site may need very general information about what products and services the company offers, while a visitor returning to follow up on a specific product will want very detailed information and will not want to wade through the company's general product overview to find that level of detail. Companies that sell fairly customized products or services may need to offer customers the opportunity to connect directly to a sales representative.

In sum, there are four elements to good online customer service:[13]

- Personalization: Customers want their particular needs to drive the system's responses to them.
- Self-service: Customers want to make their own choices, which means they need to be able to explore, select, and troubleshoot on their own.
- Immediacy: Customers want rapid access to both the information they need to make a choice and the product or service they choose.
- Intimacy: Customers want a dialogue, a process. They want the company to learn what they want from their actions and their feedback, and they want tangible evidence that the company is acknowledging and responding to their input.

Online marketing all boils down to giving individuals genuine control. People should be able to choose how much information to reveal about themselves and their wants and needs. And, when they volunteer such personal information, they need to trust that the system will reward them with proportionately greater benefits.

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[13] *Adapted from Melmon, "Real Time Marketing Versus One-to-One Marketing" (http://www.mckenna-group.com /realtime/r/rt/rt_mkg/melmon02a.html).*

3. Interactivity and Social Marketing

> Computer technology can — and doubtless will — program entire environments to fulfill the social needs and sensory preferences of communities and nations. The content of that programing, however, depends on the nature of future societies — but that is in our own hands.
>
> — Marshall McLuhan[14]

The Internet and other interactive software applications that can be delivered by computer and CD-ROM provide social marketers a unique opportunity to improve their effectiveness in two ways:

- by better tailoring behavior-change messages to the personal attributes of the target audience; and
- by improving the dissemination of such messages among members of the target audience.

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[14] *Interview with Playboy, March 1969 (http://www.mcluhanmedia.com/mmclpb01.html).*

In seeking to fully exploit the new interactive, online marketing and communication tools, however, social marketers may be challenged to fundamentally revise their approach and their frames of reference.

THE OPPORTUNITY

Social marketers seek to address social problems through behavior change, specifically, by educating and encouraging people to adopt behaviors that are beneficial to themselves and/or to society. Their objective is to tailor their interventions and messages to the personal attributes of the people targeted for behavior change (i.e., their feelings, attitudes, values, lifestyles) in order to improve the likelihood that they will listen, understand, and subsequently change their behavior. A portion of social marketers' success depends on the effectiveness of the message and their ability to deliver the message to the intended audience. Mary Jo Deering of the Office of Disease Prevention and Health Promotion at the U.S. Department of Health and Human Services, describes the model as follows:

Existing Behavior Change Communication Model

the "right" message
+ the "right" channel
+ the "right" target audience

= change to the "right" lifestyle behavior

Social marketing campaigns often rely on both mass communication and interpersonal communication to deliver behavior change messages. However, recent research indicates that mass media are not particularly effective channels for influencing attitudes or motivating behavior change:

> Most mass media channels are severely limited in their ability to provide transactional, response-dependent communication....Audience members therefore have little opportunity...[for] message clarification and elaboration.... Even if a mass-mediated communication does appeal to an individual's attitudes, the lengthy lag time between message receipt, market-based feedback, new message

> construction, and dissemination allows for deterioration in prior message relevance and recall and can result in a relapse through prior stages in the persuasive process.[15]

In contrast, interpersonal channels allow two-way communication, which helps ensure that recipients understand the message and also allows the communicators to probe and address possible sources of resistance to change.[16] In this way, interactive, two-way communication has been shown to improve the effectiveness of behavior-change efforts, for example, through computer-generated feedback reports and self-help manuals.[17]

The problem, of course, is that interpersonal communication has often been too expensive to use on a large scale — until now. The Internet provides a single channel for both mass and interpersonal communication, which enables social marketers to simultaneously disseminate messages and obtain detailed feedback.

The potential benefits of the use of the Internet extend to many areas targeted by social marketers. These benefits may be most apparent in the health field:

> For health professionals, it can be a valuable clinical tool, another medium by which information can be exchanged with colleagues and patients, and a constantly growing source of new information. The Internet can also be a valuable source of information for consumers. For patients and their relatives or close friends, particularly in cases of newly diagnosed life-threatening diseases, electronic mailing lists, online support groups, and Web sites devoted to their particular disease can provide valuable information and emotional support. The access to

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[15]*Michael M. Cassell, Christine Jackson, and Brian Cheuvront," Health Communication on the Internet: An Effective Channel for Health Behavior Change?" Journal of Health Communication (1998) 3: 74.*

[16]*Cassell, Jackson, and Cheuvront (1998), p. 74.*

[17]*Wayne F. Velicer, James O. Prochaska, Joseph L. Fava, Robert G. Laforge, and Joseph S. Rossi, "Interactive versus Non-Interactive Interventions and Dose-Response Relationships for Stage-Matched Smoking cessation Programs in a Managed Care Setting," unpublished draft manuscript, December 1996.*

> information provided by the Internet is likely to improve consumers' sense of control as well as their ability to participate actively in health care decisions, with potentially better psychological outcomes. Some have suggested that it could also improve consumers' skills for self-help and reduce the financial burden of their care.[18]

Moreover, the Internet may help social marketers address what some observers have despaired is a shortcoming of recent practice: an over-reliance on communication to the exclusion of more basic and practical marketing methods, particularly formative market research.[19] While social marketing has always been about more than communication, the new online marketing tools and strategies may make it easier and more cost-effective for social marketers to adapt and implement more commercial marketing methods.

The Challenge

The current model for health and behavior change communication leads to a focus on reducing people's risk for disease or ill health, rather than on actually improving their health, according to Mary Jo Deering. The challenge, as she sees it, is to use the Internet to move beyond behavior change strategies that emphasize risk reduction toward strategies that help people actually improve their health by:

- preventing disease and promoting good health;
- making informed decisions about when and how to seek medical care; and
- increasing their participation in the management of their health and/or illness.

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[18] *Alejandro R. Jadad, and Anna Gagliardi, "Rating Health Information on the Internet: Navigating to Knowledge or Babel?" Journal of the American Medical Association 279:8 (February 25, 1998), 613.*

[19] *See, especially, the comments of Bill Novelli of the Campaign for Tobacco-Free Kids in Consensus Conference on the Future of Social Marketing: Summary Report, by Edward Maibach et al. (Washington, D.C.: Porter Novelli, 1996), p. 8.*

Using the Internet to improve public health will require a new approach, however. Instead of disseminating targeted messages about the benefits of particular behaviors, social marketers and health communicators must now seek to empower individuals to choose healthy behaviors on their own, to make rational choices about their own health — rational choices that are based on access to information about the options.

In addition, when people gain access to the information they need, they are often motivated and empowered to learn and take action to change their own behavior and the behavior of their family, friends, and neighbors. Therefore, the social marketer's job becomes one of helping individuals make the right connections and giving them access to the information they need to make decisions to improve their health and well-being.

What People Need to Know to Manage Their Health

To manage their...	***People need...***	***Such as...***
Health	*Information for prevention*	▪ *How can I stay healthy?* ▪ *How can my family stay healthy?* ▪ *How can I have a healthy home?* ▪ *How can I have a healthy community?* ▪ *What preventive health services do I need?*
Symptoms	*Information for triage*	▪ *What is this symptom?* ▪ *What does it mean?* ▪ *How serious is it?* ▪ *Shall I wait and see, or go to the doctor?*
Disability/Illness	*Information for managing, coping, caring*	▪ *What should I do?* ▪ *How should I do it?* ▪ *Are there other options?* ▪ *Who or what can help me?*

Source: Mary Jo Deering, Office of Disease Prevention and Health Promotion, U.S. Department of Health and Human Services.

To provide people the information they need, social marketers and health communicators must make some fundamental changes in their approach, according to Deering:

- They must direct information to *individual decision-makers,* not to target audiences.
- They must deliver *decision-support tools,* not just health behavior messages.
- They must *create access to* information, not just disseminate information.
- They must use *interactive multimedia,* not just mass media, to deliver information.

In short, they must adapt a new model for behavior change communication:

New Behavior Change Communication Model
the "right" content
+ the "right" connection
+ the "right" decision-maker
= the "right" health decision

One goal of online social marketing, then, is to help people make rational choices and to act on those choices — a goal also shared by online *commercial* marketers. As one marketing consultant describes it:

> ...the consumer would like to be able to make intelligent, well-informed choices from among a meaningful set of products and services, with options that genuinely help rather than trivialize or confuse.[20]

The next section examines how social marketers may use the online tools and strategies that commercial marketers have developed to facilitate intelligent decision-making and behavior change.

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[20] *Rich Melmon, "Real Time Marketing Versus One-to-One Marketing" (http://www.mckenna-group.com/realtime/r/rt/rt_mkg/melmon02a.html).*

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4. Some Strategies for Social Marketers

Social marketers can effectively implement the new, interactive marketing tools by following the same approach they have used in applying more traditional tools. After all, the Internet is just another media channel, and most of the rules for successful communication will still apply.

Here are some basic rules for social marketers seeking to integrate the Web into their overall strategy, distilled from the presentations at the Washington Roundtable on Social Marketing and from other sources.[21]

1. Develop your audience into a virtual community.

The primary online tool of commercial marketers is an interactive Web site. Commercial marketers use Web sites to establish a dialogue with their customers. Social marketers can use Web sites for the same purpose: to establish a personalized, interactive dialogue with their target audiences. The goal is to build a virtual community around the site. Users should be brought to identify with the

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[21] *Annex 3 lists a number of online resources for further information and, in some cases, detailed instructions for actually implementing an online marketing strategy.*

"brand" — who and what is being promoted — regardless of whether the brand is a product, a service, an organization, an idea, a political cause, or a category of information.

To help attract new members to the community, all sites should be registered with online search engines (Yahoo!, Excite, AltaVista, Infoseek, etc.), using key words that resonate with and capture the attention of the target audience. Visitors should be invited or required to register when they visit a site, and the developer should build a profile of the members of their online community using the information users provide and by tracking their use of the site. Direct e-mail links to the site host let users provide feedback on the content and request additional information. A LISTSERV (electronic mailing list) allows members of the community to communicate with each other.

Web sites that succeed in establishing a sense of community quickly attract attention and new members. This can be a double-edged sword: a reputation for good online customer service will spread quickly, but mistakes can reverberate for a long time.[22]

2. Build strategic partnerships and alliances.

Partnering with an established online brand, and tapping into their expertise can help social marketers effectively "package" their messages to appeal to particular target audiences. Partnerships can be as simple as direct links to a related Web site, to licensing of a logo or character, to hiring a spokesperson, to full co-sponsorship of a site. As with all co-branding arrangements, social marketers must ensure that their alliances protect their good reputation and do not alienate members of the target audience.

3. Leverage traditional marketing activities.

Social marketers can build on their past successes and capitalize on their existing reputation. Like commercial marketers, social marketers should develop a clear vision of the essence of their organizational "brand" and key messages, and use

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[22]*Kim J. Brooks, "Internet Marketing: New Game, New Rules," WebPromote Weekly, September 1998, volume 1 (http://www.WebPromote.com/wpweekly).*

them to determine what information they provide and how they provide it. For example, the Yellow Pages is a national brand, even though the product is totally different in every locale.

4. Stay within the budget.

Social marketers should set a budget for their online activities and stay within it. Despite its meteoric growth, the Internet has yet to become a strong source of revenue or profit, even for the most forward-looking and aggressive online marketers. That means that online activities should remain just one part of a social marketer's overall marketing and communications strategies. In fact, many companies are reassessing the cost of their Web presence, in part because they are not sure what they are getting in return. Nonprofit organizations face an even greater challenge in making their online activities "profitable" in terms of building brand recognition or extending their marketing and communications reach. One way to avoid having to invest in new technologies or systems is to build on existing technical capacities and marketing channels. Alliances and partnerships provide another way to share or defer the costs of launching a Web presence.

5. Develop a clear content development strategy.

The Internet is different; to use it effectively, social marketers must capitalize on the sensory differences. Specifically, while other media use only two senses, the Web is fully interactive. Social marketers should use interactivity to establish a connection with their audiences — for example, through strategic alliances or spokespeople. Social marketers should seek to put users fully in control of their learning and to communicate with them by engaging all their senses.

> It is not enough to put information "out there;" social marketers need to help people see how they can use that information to take action.

A recent article in *Harvard Business Review* explains how some leading-edge companies are "staging experiences" that engage their customers in a personal, memorable way, some of which is applicable to social marketers. The authors offer the example of the Walt Disney Company to identify five principles for

creating memorable customer experiences, which are also applicable to the online experience of visiting a Web site:[23]

- **Create a consistent theme that resonates throughout the experience**. (Social marketers must deliver a clear message or set of related messages that do not confuse.)
- **Layer the theme with "positive cues," or easy-to-follow signs**. (Social marketers should chart the course for people who are considering changing their behavior.)
- **Eliminate "negative cues," or messages that distract or contradict the overall theme.** (Once social marketers chart a course toward behavior change, they must provide the information users need to take action to reach the next step in the process.)
- **Offer memorabilia and momentos to commemorate the experience for users** — give them something to take away. (For social marketers, this may be as simple as links to related Web sites, an opportunity to be added to a mailing list, an offer of free publications, or a giveaway. The American Friends Service Committee, a Quaker relief and service organization, recently offered free buttons to visitors to its Web site: http://www.afsc.org.)
- **Engage all five senses to heighten the experience** and make it more memorable. (Social marketers should seek to exploit the Internet's ability to deliver — and people's increasing ability to use — a fully interactive experience, including audio and video, voice and e-mail links and teleconferencing e-mail.)

6. Track the usage and the "usability" of your site.

Social marketers must learn the needs of their users and meet them. There is a natural tendency to overwhelm people with information; social marketers should resist the urge to post everything. Instead, social marketers should concentrate on the quality, relevance, and appropriateness of the information they provide. For example, users need to be able to read and understand the information, but they

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[23] *B. Joseph Pine II and James H. Gilmore, "Welcome to the Experience Economy," Harvard Business Review (July-August 1998). http://www.hbsp.com/products/hbr/*

do not want to be approached at a level that insults their intelligence or expertise. The power of interactivity is that it allows each individual user to choose what information to receive; social marketers can increase their effectiveness by allowing their audiences to also choose the level of detail they want.

7. Urge and enable action.

Social marketers, and others who seek to influence behavior or public policy, must actively seek to exploit the bias of interactivity toward ongoing learning and action. The Internet makes it easier to distribute information to members of an online community *and* to allies in other communities. By establishing an meaningful dialogue with people who support their activities or cause, social marketers can motivate them to take action. But people cannot act if they are not given the opportunity. Social marketers should be sure to provide a range of possible actions people may take. For example, Common Cause (http://www.commoncause.org) and other political advocacy groups give people several opportunities to act, by making a contribution, joining e-mail "action alert" networks, or sending e-mails to their elected representatives at the local or national level — all at the click of the mouse. A number of humanitarian organizations and charities continually update their sites to provide current information on natural and man-made disasters and to provide opportunities for people to help.[24]

Visitors to a Web site can be invited to add themselves to an electronic or postal mailing list or to join a LISTSERV. This helps them find and communicate with other people like them, in person or online. For example, smoking-cessation campaigns may provide a list of smoking cessation clinics in the user's area or hot links to sites providing more information.

Social marketers must use the principles of effective marketing to design a Web site that is clear, simple, and easy to navigate. The site must readily provide users with the information they need to make a rational choice to take action. Once they choose to act, the site must give them an opportunity to do so in a simple, straightforward way.

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[24] *See, for example, Save The Children (http://www.savethechildren.org); the Red Cross (http://www.redcross.org); and InterAction, a coalition of over 150 such organizations (http://www.interaction.org).*

8. Protect users' privacy.

Privacy is one of the main reasons people cite for not using the Internet for commerce and other transactions, according to David Wickenden of Fleishman Hillard.[25] Online marketers must seek to ensure the privacy of personal information, not least because the federal government is poised to act if they do not:

> The cost of privacy violation...is a clear and present danger to the economic health of the country. Unless privacy is protected soon, the revolutionary potential of the Internet will never be realized.... Time is running out for the Net community.[26]

Develop a privacy policy, and makes its full implementation a building block toward a fully consensual marketing relationship with your users. Your policy statement should include the components in this sample:

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[25] *Based on Business Week/Harris survey, March 16, 1998, and the 8th Annual Georgia Tech Survey of Web Users (http://www.cc.gatech.edu/gvu).*

[26] *Business Week, March 18, 1998.*

Sample Privacy Policy Statement

E-mail Addresses: *We do not collect our users' e-mail addresses (or any other personally identifying information) except when you specifically and knowingly give us that information. We do maintain a list of those e-mail addresses that our customers provide so we can send out promotional messages about our activities and services. If you wish to have your name removed from our e-mail address list, simply e-mail us at [e-mail address], or click here and complete the appropriate form, or write to us at [postal address]. You may also ask that your name be removed from our e-mail address list when you first provide that address to us.*

Collection of Information: *We also collect data on our customers' reaction to the content, services, or merchandise we offer online. We do not disclose any of this information to third parties.*

Credit Card Transactions: *When you make purchases using your credit card, the transactional information, including your credit card number, is stored on our server for archival purposes only. That information is encoded within industrial-strength 64-bit encryption. We also offer Secure Sockets Layer (SSL) encryption on new customer registrations.*

Children: *Be sure to ask your parents for permission before you send any information about yourself over the Internet to us or to anyone else.*

Source: compiled from a number of consumer and governmental sites.

9. Update the site to encourage recidivism.

The main marketing goal of any Web site is repeat use. This is to ensure that the audience is listening when there is something new to say. Commercial and social marketers alike want users to bookmark their sites and visit often, developing a sense of loyalty and connection to the community anchored by the site. But visitors must find something useful or rewarding each time they visit, or they will stop coming back. Web sites must be updated often, and returnees must be able to easily find what is new by using buttons and banners that point to new information and give them a way to act on that new information. Most large consumer products firms constantly update their sites; other commercial firms update their sites weekly or monthly.

A number of sites geared to children post serials (online comics or interactive magazines) that have a running storyline and are updated on a regular schedule, usually weekly.[27] This provides their users with a schedule for repeat visits.

Limited budgets or staff resources may force many nonprofits to update their sites only when they have new information to post — new research, a new policy agenda, new publications. These organizations should make an effort to alert core constituents (and, ideally, all previous visitors to the site) about site expansions or updates. This can be done by mail or e-mail and, at a minimum, with a banner or highly visible button on the home page of the site.

10. In general, exploit the advantages of the Web.

In short, the most effective online marketing strategies are those that exploit the advantages of the Internet over more traditional media, particularly the Web's ability to:

- build strong communities;
- disseminate information rapidly;
- facilitate two-way communication; and
- provide customized and detailed information.

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[27] *See, for example, Disney (http://www.disney.com/Kids); Nickolodeon (http://www.nick.com); the Public Broadcasting System (http://www.pbs.org/kids).*

Meeting the Information Needs of Users: A Checklist for Online Social Marketers

- *Who are my users?*
- *What information do they need?*
- *Does the information I provide meet their needs? Does it make sense to them?*
- *Is content placed where my users expect to find it (i.e., by category, navigational position, platform)?*
  - *How are users getting to my site?*
  - *How are they using my site?*
  - *How can I publicize/link my site to attract more users?*
- *Am I establishing an interactive, two-way connection with my users?*
- *Am I communicating my brand (who I am, what I do, my reputation)?*
- *Am I empowering my users to control their own learning and action?*
- *Am I protecting my users' privacy?*
- *Am I motivating users to come back and rewarding them for repeat use of my site?*
- *Am I updating the site and alerting users to new or expanded information?*
- *Am I exploiting the power of the Internet to:*
  - *build strong communities?*
  - *disseminate information rapidly?*
  - *facilitate two-way communication?*
  - *provide customized and detailed information?*

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5. Issues and Challenges for the Future

Social marketers face a number of challenges in seeking to exploit interactive technology to address social problems.

1. Identifying Adequate Technical and Human Resources

For many social marketers, the main obstacle to exploiting the Internet and other interactive tools is a lack of resources. Their parent or employer organizations generally lack the human and capital resources that many commercial firms can use to invest in new technologies and applications. Therefore, many, if not most, social marketers will be unable to develop the technical and human capacity to launch and maintain a Web site on their own. Even those who do overcome the obstacles and launch a site may be unable to devote the resources necessary to continually update and publicize the site, attract traffic, and promote repeat use.

One way for social marketers to leverage their resources and skills is to build partnerships and alliances with those with a greater capacity for online marketing. Another answer is to contract individuals or firms with online marketing capabilities and expertise.

2. Overcoming Barriers to Organizational Change

As with most new technologies, interactivity carries the promise (or threat) of totally changing the environment for human behavior. New communications technologies allow the instantaneous movement and diffusion of ideas and opinions, research and technology, money and credit, products and services, and trends and culture. This will force social marketers to change the way they operate, as noted elsewhere in this document. For many, the changes will revolve around the need to meet people's heightened expectations about the speed at which they can gain access to detailed information and the opportunities they will have to take immediate action.

For other social marketers, accommodating the new technologies will involve more troubling or difficult issues. For example, interactivity may blur the distinction between messenger and target as it collapses the processes of action and reaction, message and response. Interactivity may also make it more difficult for social marketers to "test" their ideas or approaches among a limited or proscribed target audience and to correct or retract false or misleading information, perhaps increasing the risks of unintended, negative consequences. Social marketers may also find it nearly impossible (and irrelevant?) to establish a behavioral baseline against which to measure or gauge the results of their online activities.

Some social marketers will be forced to accommodate fairly dramatic changes in the operations and/or roles of their parent organizations. This may be particularly true of those who work in larger, more established institutions (i.e., government, academia, big business) that formerly exercised some measure of control over the public's access to critical technologies and knowledge. Social marketers in such institutions may find that their main task shifts from educating people about the potential uses of such new technologies or research to *re-educating* people who have received false or misleading information (discussed in more detail below).

Still others will need to develop new systems for defining, measuring, and responding to the results of their new online marketing programs. Specifically, the Internet offers instant feedback not only to customers, but also to program managers and their supervisors:

> The company will be able to learn at all levels what works and what doesn't — in real time. Marketing programs — from pricing decisions to promotional programs to

> decisions about creative direction and budgets for advertising — will be dynamically adjusted.... They will have direct feedback — in real time — and will no longer have to rely on tedious processes in which layers of organization struggle to indirectly interpret, through research and product marketing organizations, what the market wants and doesn't want.... Everything will get measured. Everything will become tighter. For some it will be a dream; for others, a nightmare. Because there will be nowhere to hide. No program will be allowed to remain obscure.[28]

3. Competing in the Crowded Market for Information

Social marketers seeking to move online will need to compete for people's attention against the flood of information now available with the click of a mouse. Again, the average Internet user has about a half-hour each day to use the information now available on over 50 million Web sites.

Competing in the information marketplace involves accommodating two realities:

- **The Abundance of Information.** Social marketers must combat the growing feeling among consumers that they are barraged by too much information. Ever-improving targeting and segmenting techniques are making more and more people either immune or actively hostile to marketing messages. This is both a cause and a result of what Daniel Greenberg dubs "the sledgehammer approach." For example, the proliferation of telemarketing leads many people to avoid answering their phones during the evening hours when most telemarketing activity occurs, and many TVs and VCRs can be programmed to automatically mute or skip commercials.

  To win back customers' trust and loyalty, online marketers must focus on providing customer satisfaction rather than winning market share. They must offer real choices, not meaningless product differentiations. As Mary Jo Deering and others emphasize, in the world of information, giving people real

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[28] *Rich Melmon, "Real Time Marketing Versus One-to-One Marketing" (http://www.mckenna-group.com /realtime/r/rt/rt_mkg/melmon02a.html).*

choices requires providing them the information they need to make rational decisions.

- **The Quality of Information.** A bigger challenge to social marketers than the overabundance of information is the proliferation of bad, false, or misleading information. This is a particular problem in the area of public health:

> ...Tools such as Internet directories, indexes, and search engines assist health care providers and consumers in their search for health information, particularly on the World Wide Web. However, searching for and locating information are only starting points, after which the Internet users themselves must choose appropriate resources to guide their decisions. Judging whether the information is applicable and credible may present a greater challenge than just searching for information. To make this process more time efficient, Internet users may rely on a number of Internet resources that review and rate Web sites that provide health information. Theoretically, by relying on these ratings, users could more easily identify valuable information on the Internet. However, if the instruments used to produce the ratings are flawed (e.g., if they are produced to sell specific products or if they do not have any discriminative power), they may mislead or misinform health care providers or consumers.[29]

Many social marketers will take on, as their primary online challenge, the task of helping Internet users locate the kind of accurate, reliable information they need to make informed choices about their health and well-being. For example, Mary Jo Deering oversees the site developed by the U.S. government to provide a gateway to accurate consumer health and human services information (http://www.healthfinder.gov).[30] This site provides links to selected online

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[29] *Alejandro R. Jadad, and Anna Gagliardi, "Rating Health Information on the Internet: Navigating to Knowledge or Babel?" Journal of the American Medical Association 279:8 (February 25, 1998), 611.*

[30] *This site was developed by the US Department of Health and Human Services (HHS), in collaboration with other federal agencies, and is coordinated by the Office of Disease Prevention and Health Promotion (ODPHP), of the US Centers for*

publications, clearinghouses, databases, Web sites, and support and self-help groups, as well as the government agencies and nonprofit organizations that produce reliable health information for the public.

4. Meeting the Practical Challenges of Managing Online Activities

The practical challenges of going online are formidable. Social marketers must find a way to sort through the hype surrounding the Internet and determine which aspects of the new information technologies are most applicable to their work and operating environment. They must monitor trends in the information technology (IT) industry to judge which technologies may be worth their time and money and they must gauge the likely costs (in capital, labor, and training) of new applications and technologies. They must practically assess the overall impact of using such new technologies on their programs as well as on their institutions and staffs. And, finally, they must learn how to effectively manage an IT project, from identifying and interviewing outside contractors, to negotiating and monitoring IT contracts.

Most social marketers will find it highly impractical to quickly scale the learning curve associated with implementing and managing large IT projects. Their best strategy will be to tap the technical and management expertise of others. Those who work in large public or educational institutions may be able to find that expertise among their colleagues in other agencies or departments. Others, particularly those in small private or nonprofit organizations, may need to look for help from one of the growing number of firms that specialize in online marketing, including the many new Internet-based business and more established public relations, advertising, and businesses consulting firms.

As Bill Smith of AED points out, the new media require new measures of success. Is a successful Web site one that enjoys the highest number of "hits" by file, Smith asks, or is it one that has the most number of pages downloaded, visits by different users, or most identified users (i.e., users who register and provide key demographic data)? As Smith notes, with the average user spending just a half-hour per day visiting the multitude of sites on the Web, no method for sampling hits or traffic can provide a very reliable measure of success.

Disease Control and Prevention (CDC).

Yet every site developer needs to provide its sponsors with some measure of the site's impact, whether the sponsors are paid advertisers, corporate parents, foundations, or taxpayers. One step toward that end is the recent development by the Coalition for Advertising Supported Information and Entertainment (CASIE) of some guiding principles for measuring the audience for interactive media, including "cyberspace media" that deliver their content via computer (online services, the Internet, and CD-ROM) and interactive television. (These principles are reprinted in Annex 5.)

5. Reaching People without Access to the Internet

The communications revolution has shifted the balance of power away from institutions and toward individuals. In many ways, access to new and emerging technology is becoming synonymous with access to knowledge and to political and economic power. New technologies are vastly increasing individuals' freedom and control in many ways, from exposing political repression and human rights abuses and allowing more direct political representation, to expanding access to information, education, and products and services for those in remote areas.

There is a danger that, as the pace of change increases, so will the gap between those at the forefront of change and those left behind. With key institutions increasingly unable to moderate and equilibrate the effects of change, particularly on the poorer or less empowered segments of society, the equity of access to the Internet and other new technologies becomes critical. This is true on a local, national, and international scale.

A number of efforts are underway to broaden access to the new technologies, within the United States and throughout the world. Such projects are offering access to the Internet to people through universities and other public education facilities, cybercafes, public information kiosks, learning centers, and commercial business-service centers (i.e., Kinko's). These include the U.S. Agency for International Development's (USAID's) Leland Initiative (Africa Global Information Infrastructure Gateway Project) to achieve broad-based utilization of global information technologies to promote sustainable development in Africa (http://www.info.usaid.gov/leland). Another is USAID's LearnLink project to use culturally appropriate communication and education technologies to strengthen learning systems essential for sustainable development (http://www.aed.org/learnlink).

A key challenge for social marketers, according to Bill Smith, will be to understand who is online and who is offline and to develop and test applications

to successfully communicate with both. The focus, he says, must be on the behaviors, *not* on the technology.

In the future, being online will not necessarily always involve computer-to-computer communication. People will increasingly be able to gain low-cost, easy-to-use, online access through Internet TV (WebTV), Web phones, ordinary telephones, info kiosks, and other new communications tools.

In many ways, then, broadening access to the Internet will be simplified by the technology itself:

> Members of a target audience need not know how to use a computer — or even have access to one — to have access to video, audio, and text-based information supplied through the Internet. The technology already exists to supply individuals with high-speed Internet connections through their home television sets. User-friendly interfaces such as touch screens, voice recognition, and hand-held remote controls can be used instead of keyboards to interact with programs on the Internet. Thus, the Internet has the potential to reach those with low computer and reading literacy levels with a wide array of visual and audible cues.[31]

CONCLUSIONS

In the end, whether they forge ahead on their own or work in partnership with other individuals and organizations, social marketers must continue to assess the promise of interactive tools against the three basic criteria outlined at the start of the 1998 Roundtable on Social Marketing:

- How can social marketers use these tools?
- What social problem could they help solve?
- Do these represent a better or more efficient way to focus on our audiences?

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[31] *Michael M. Cassell, Christine Jackson, and Brian Cheuvront, "Health Communication on the Internet: An Effective Channel for Health Behavior Change?" Journal of Health Communication 3:76.*

Annex 1. Agenda and Participants

MARKETING@problems.social

A Washington Roundtable

Sponsored by the Academy for Educational Development

Hosted by Bill Smith and Beverly Schwartz

Wednesday, March 25, 1998

The Westin Hotel, 9am – 3 pm

Moderator: Beverly Schwartz

The Web: Redefining the World of Marketing

Krystal Thomas
Vice President, Business Development, Magnet Interactive

Behavior Change and Beyond

Mary Jo Deering
Director of Health Communication and Telehealth, Office of Disease Prevention and Health Promotion, U.S. Department of Health and Human Services

Gaming: Building Judgment, Not Just Brand Loyalty

Daniel Greenberg
Author, "Fast Forward" Column, *Washington Post;* Paradym Productions

Discussion Panel: Krystal Thomas, Mary Jo Deering, Daniel Greenberg

Building e-Business through Web-atising

David Wickendon
Senior Vice President and Senior Partner, Fleishman-Hillard

Web-Based Research: Targeting Web Users

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Annex 2. Glossary[32]

Ad: For Web advertising, an ad is almost always a "banner" or graphic image of a designated pixel size and byte size limit. It is often animated. Also referred to as "ad creative."

Ad rotation: Ads are often rotated into ad spaces from a list. This is usually done automatically by software on the Web site or at a central site administered by an ad broker for a network of Web sites. (Central Ad, http://www.centralad.com, produces one inexpensive ad rotation program.)

Ad space: A space on a Web page that is reserved for ads. A group of such spaces with a single Web site that share the same characteristics and that can be purchased together is called an "ad space group."

Ad view: A Web page delivered in a way that guarantees that the receiving viewer will actually see the ad. Ad views are what most Web sites sell or prefer to sell. Assuming that each ad is fully visible when a page arrives, the number of ad views equals the number of page views times the number of ads on the page.

Banner: A banner is an advertisement in the form of a graphic image that typically runs across a Web page or is positioned in a margin or other space reserved for ads. Banner ads are usually "GIF" images. In addition to adhering to size, many Web sites limit the size of the file to a certain number of bytes so that the file will display quickly. "Animated GIFs" have been shown to attract a larger percentage of user clicks. The most common larger banner ad is 468 pixels wide by 60 pixels high. A smaller size is 120 by 90 pixels.

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[32] *Adapted from the glossary produced by whatis.com Inc. (http://www.whatis.com). See also the glossaries compiled by interactive media brokers ADSmart (http://www.adsmart.net) and DoubleClick (http://www.doubleclick.com).*

Booked space: The number of ad views for an ad space that is currently sold out.

Caching: In Internet advertising, the pages are saved, or cached, in a server or the user's computer. For advertisers, this means that some ad views will not be known by the ad counting programs, which is a source of concern.

Click: A click is a Web page user's mouse click on an ad, which results in a hypertext link (that is, immediately "going to") the site sponsoring the ad.

Click stream: A click stream is a recorded path of the pages a user requested in going through one or more Web sites. Click-stream information can help Web site owners understand how visitors are using their site and which pages are getting the most use. It can help advertisers understand how users get to the client's pages, what pages they look at, and how they go about ordering a product.

Clickthrough: A clickthrough is what is counted by the sponsoring site as a result of an ad click. In practice, "click" and "clickthrough" are used interchangeably. A clickthrough, however, implies that a user actually received the page, and some advertisers are willing to pay only for clickthroughs rather than for ad views.

Click rate: The click rate is the percentage of ad views that result in clickthroughs. A clickthrough indicates an ad's effectiveness in steering the viewer to the advertiser's Web site, where other messages can be provided. A new approach is to use clicks to link not to another site but to a product order window. In general, click rates vary from 1 percent to as high as 15 percent, with most probably below 5 percent.

Cookie: A file on a Web user's hard drive (in a subdirectory in the browser directory) that is used by Web sites to record data about the user. Some ad rotation software programs use cookies to track which ad the user has just left and, as a result, to rotate a different ad into the next page view.

CPM: Cost-per-thousand-page views. This measure is taken from print advertising. Since not all page views result in seeing the ad (for example, if a page scrolls, an ad may be initially out of view), CPM is often interpreted to mean the cost-per-thousand ad views. (The "M" is the Roman numeral for thousand.)

CPTM: Cost-per-thousand targeted ad views, which implies that the target audience matches a particular demographic profile.

Demographics: Data about the size and characteristics of a population or audience (for example, gender, age group, income group, purchasing history, personal preferences).

Filtering: Filtering uses immediate analysis (by a software program) of a user's request for action or information to determine which ad(s) to return in the requested page. The filtering program determines whether the request fits certain characteristics, such as coming from a particular company address or a particular level of browser.

Hit: The sending of a single file from a site, regardless of the file type (i.e., including HTML files, images, audio files, or files of other types). A single request can bring a response comprised of any number of individual files, therefore, the number of hits from a site does not accurately measure the actual number of visitors to a site, although it does provide a good indicator of traffic flow.

Impression: An impression is a view in usage either a page view or more usually an ad view.

Media broker: Media brokers aggregate sites for advertisers based on audience niches and other factors. Among the largest media brokers are ADSmart (http://www.adsmart.net), DoubleClick (http://www.doubleclick.com), and Petry Interactive Network (http://www.petry.com).

Psychographic characteristics: A term originated by ADSmart to refer to personal interest information provided to Web sites by users.

Splash page: A splash page (also known as an "interstitial") is a preliminary page that precedes the regular home page of a Web site and usually promotes a particular site feature or provides advertising. A splash page is timed to move on to the home page after a short period of time.

Targeting: Purchasing ad space on the Web sites that match the advertiser's audience and campaign objective requirements.

View: An ad view. Also refers to page view, which is slightly different (i.e., higher), because a small percentage of users program their browsers not to

display the images embedded in Web pages (usually to speed up downloading).

Visit: An entry into a Web site by a user with a unique address for the first time that day (or some other time period). The number of visits is roughly equivalent to the number of different users who visit a site. Also referred to as a "session."

Annex 3. Internet Resources for Social Marketers

Below is a brief list of some electronic resources for social marketers, including Internet sites, electronic mailing lists, and on-line publications. The list was compiled from the materials distributed and referenced at the 1998 Washington Roundtable on Social Marketing and does not constitute any endorsement by the meeting organizers or AED, the sponsoring organization.

http://www.commercepark.com/AAAA: The site of the American Association of Advertising Agencies, a national trade organization that offers information about the operation of ad agencies, the AAA membership roster, and *BackChannel*, an interactivity newsletter.

http://www.activmedia.com: ActivMedia, Inc., is a private firm specializing in quantitative studies of online marketing, as well as market analysis and case studies.

http://www.adage.com: An interactive site from Advertising Age, a leading source of marketing, advertising and media news, information, and analysis.

http://advweb.cocomm.utexas.edu/World/Social.html: Links to information on social marketing from the University of Texas.

http://www.anywhereonline.com: ANYwhere Online, an alliance among Nielsen Media Research, Yankelovich Partners, and ASI Market Research, seeks to be "the pre-eminent Web site" for the market research industry.

http://www.commercepark.com/AAAA/casie: The Coalition for Advertising-Supported Information and Entertainment (CASIE), a joint effort of the AAAAs and the Association of National Advertisers, has published a set of "guiding principles for interactive media audience measurement."

http://www.commerce.net: CommerceNet is an industry association for Internet Commerce with about member 500 companies and organizations worldwide. Site includes links and statistics about e-commerce trends and services.

http://www.cyberatlas.com: Reporting and features on planning, executing, and quantifying Web advertising and marketing. Includes data on market size, demographics, and usage. Billed as "the reference desk for Web marketing."

http://www.findsvp.com: FIND/SVP provides links and research on a variety of products and services, including a guide to market research on the Web.

http://www.foundation.novartis.com/atoz/social_marketing_links.htm: A list of social marketing resources from A to Z, with hot links to listed sites.

http://www.cc.gatech.edu/gvu: Georgia Institute of Technology's Graphics, Visualization & Usability (GVU) Center, which conducts Web-based surveys on user profiles and attributes.

http://www.hc-sc.gc.ca/hppb/socialmarketing: Health Canada's Social Marketing Network.

http://www.health.org/pubs/PRIMER/smarket.htm: Part of PREVLINE, which offers electronic access to searchable databases and substance abuse prevention materials that pertain to alcohol, tobacco, and drugs. Produced by the National Clearinghouse for Alcohol and Drug Information (NCADI), the information service of the Center for Substance Abuse Prevention of the Substance Abuse and Mental Health Services Administration in the U.S. Department of Health & Human Services.

http://www.healthfinder.gov: a gateway consumer health and human services information site from the U.S. government, which links to selected online publications, clearinghouses, databases, Web sites, and support and self-help groups, as well as the government agencies and nonprofit organizations that produce reliable information for the public.

http://www.iab.net: Internet Advertising Bureau (IAB), an industry association devoted to promoting the use and effectiveness of advertising on the Internet.

http://www.idcresearch.com: The site of International Data Corp. (IDC), publisher of a number of periodicals on the Internet and information

technology, includes news, articles, and event calendars on the IT market around the world.

http://www.instantweb.com/foldoc: The Free Online Dictionary of Computing (a mirror site of the original site created by Denis Howe), a searchable dictionary of acronyms, jargon, programming languages, tools, architecture, operating systems, networking, theory, conventions, standards, mathematics, telecoms, electronics, institutions, companies, projects, products, history — anything to do with computing.

http://www.internet.com: This is a network of sites published by Mecklermedia which includes InternetNews.com, CyberAtlas.com, and other sites on Internet commerce and technologies.

http://www.ipro.com: Creator of CyberAtlas (now housed on the Internet.com site), I/PRO provides Web measurement and analysis systems and provides Web traffic measurement and analysis solutions.

http://www.isoc.org: The Internet Society describes itself as a nongovernmental international organization for global cooperation and coordination for the Internet and related technologies and applications.

http://www.jup.com: Jupiter Communications provides research and analysis of the consumer online industry and online advertising.

http://www.mckenna_group.com: The McKenna Group is a Silicon Valley-based consulting firm (with an office in Boston) specializing in developing information and telecommunications management, marketing and alliance strategies.

http://www.media.mit.edu: The site of MIT's Media Laboratory, which conducts advanced research into a broad range of information technologies including digital television, holographic imaging, computer music, computer vision, electronic publishing, artificial intelligence, human/machine interface design, and education-related technologies.

http://members.aol.com/weinreich/index.html: The Social Marketingplace, a site developed and hosted by Weinreich Communications, a social marketing and health communications consulting firm based in the San Francisco Area.

http://www.mids.org: Matrix Information and Directory Services (MIDS) examines the composition, content, and users of the Internet and other networks in the "matrix" of computers worldwide that exchange e-mail.

http://netb2b.com/: Wide array of information on Internet marketing, including Web site pricing strategies, lists of Web developers by city, and articles and resources on Web marketing (produced by Business Marketing).

http://www.nielsen.com: Nielsen Media Research surveys households about their usage of various media, including the Internet. Through a strategic alliance with Internet Profiles Corp. (I/PRO), Nielsen provides a broad range of Internet measurement and evaluation services.

http://psiwash.org/social.htm: General information about social marketing and specific information about the programs of Population Services International (PSI).

http://www.relevantknowledge.com: Relevant Knowledge provides national audience measurement for sites on the Web, including measures of total page views and average page views per "unique visitor."

http://www-scip.stanford.edu/scip: The site of the Stanford Computer Industry Project (SCIP), an interdisciplinary research program dedicated to exploring the business, political, and technological dynamics of the worldwide computer and information technology industries, which was launched in 1991 with a grant from the Alfred P. Sloan Foundation. Site includes technical articles, working papers, case studies, and an international database on "Excellence in Electronics."

http://www.wired.com: Trends related to the Internet and e-commerce.

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Below is a list of materials referenced in this document or distributed or cited at the 1998 Washington Roundtable on Social Marketing.

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Annex 5. Excerpt from CASIE Principles for Interactive Media Audience Measurement

Coalition for Advertising Supported Information and Entertainment

CASIE GUIDING PRINCIPLES OF INTERACTIVE MEDIA AUDIENCE MEASUREMENT[33]

Overview

CASIE (a joint project of the Association of National Advertisers, Inc., and the American Association of Advertising Agencies), with the support of the Advertising Research Foundation (ARF), has created the Guiding Principles of Interactive Media Audience Measurement. This working paper focuses on supplying guidelines for providing quality audience measurement of interactive media, both cyberspace and interactive television, at the levels of vehicle exposure as defined in the ARF document "Toward Better Media Comparisons."...

All the following guiding principles apply to the measurement of both cyberspace and interactive television. While at times only the language of computers is used, the application of interactive television will be provided....

Principles

What follows is a brief statement of each principle. Rationale and discussion of the principles follow these statements.

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[33] http://www.commercepark.com/AAAA/bc/casie/guide.html

- Best Media Research Practices

Audience measurement of interactive media should follow the criteria developed for other types of media research over the last eight decades, except where these are clearly not applicable, to ensure estimates that are accurate, precise and reliable....

- Third Party Measurement/Auditing

Audience measurements should be taken by objective third party research suppliers and not by the medium being measured. Measurement by the medium itself via the "clickstream" (as defined earlier in the document, Annex 2 - Glossary), when offered, should be audited by an objective third party. In all cases, established industry auditing practices should be employed. Third party audience measurement could also benefit from being audited.

- Full Disclosure

Complete information about research methods and practices used as well as all the data collected should be revealed to all research subscribers. Carefully scrutinized exceptions may be made so as to allow research providers to protect trade secrets where the claim of such trade secrets preventing the disclosure of specific information is judged to be credible by the user community based on the known facts of the specific case.

- Comparability

It is highly desirable that audience estimates covering a particular interactive vehicle be directly comparable to estimates covering another interactive vehicle within the same interactive medium.

- Methodological Experimentation Encouraged

Research organizations are encouraged to be innovative in method and practice. The burden of proof of the validity of the measurement and of conclusions based on the measurement is on the research company.

- Privacy

Consumer identities must not be revealed by audience measurement providers except if necessitated for audit purposes. Every effort should be made to maintain consumers' privacy.

- User Information Preferable

To evaluate audiences of a medium, advertisers need to know the number of different users accessing the medium and the number of times they access it in a given period of time. The product of these two key measures provides a gross-exposures measure (called "visits" in cyberspace) which can be used to calculate measures of cost efficiency comparable to other media. Together these key measures provide data comparable to that available for other media.

- Use of Census and Sample

Measurement of users at the level of persons rather than households may, in many cases, necessitate the use of a sample. While a census has advantages over a sample, the need for a measurement of individual person users should not be compromised in order to gain these advantages. When and if a truly complete and accurate census of users is made available, that is most preferable. A combination of a census of visits plus a users' sample would be one viable approach to maximizing accuracy at every level.

- Non-Intrusiveness

Measurement methods which are least visible to consumers, and require the least effort on their part, are preferable to methods which are more visible to consumers and/or which require more effort.

- Total Medium Measurement

It is highly desirable that audience estimates be provided within the context of a total medium measurement so that principal vehicles within that medium might be directly evaluated against one another and against the total medium norms. Measurement of part of a medium will be acceptable when it is a practical expedient within a given time frame.

- Industry Consensus

Interactive media research standards ought to be set by a broad representation of the advertising industry, including advertisers, agencies, media, research companies, and industry bodies. No effort was spared to follow this principle in the creation of the present document. However, these principles will remain adaptable as the media evolve.

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